

The logo consists of the letters 'USA' in a bold, sans-serif font, where each letter is composed of a grid of small white dots.

VisitTheUSA.com

Brand USA

Market Information

THE NETHERLANDS,
BELGIUM,
& LUXEMBOURG

2020

About This Guide

This market guide includes a snapshot of the economies in the Netherlands, Belgium, and Luxembourg, along with information about travel from this region (booking channels, consumer trends, U.S. international inbound visitation data, and key travel motivators and indicators).

Cover photo: Volendam, Netherlands

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Brand USA



Who We Are

Our Mission

As the destination marketing organization for the United States, Brand USA's mission is to increase incremental international visitation, spend, and market share to fuel the nation's economy and enhance the image of the USA worldwide.

Established by the Travel Promotion Act of 2009 as the nation's first public-private partnership to spearhead a globally coordinated marketing effort to promote the United States as a premier travel destination and to communicate U.S. visa and entry policies, Brand USA began operations in May 2011.

Building on Success

As one of the best levers for driving economic growth, international travel to the United States currently supports 1.8 million American jobs (directly and indirectly) and benefits virtually every sector of the U.S. economy. Since its founding, Brand USA has worked with more than 900 contributing organizations to invite the world to explore the exceptional, diverse, and virtually limitless travel experiences and destinations available in the United States of America.

Photos: Zaanse Schans, Netherlands (left); Bouillon, Belgium (right)



Our Partnerships

Brand USA's operations are supported by a combination of non-federal contributions from destinations, travel brands, and private-sector organizations plus matching funds collected by the U.S. government from international visitors who visit the United States under the Visa Waiver Program.

According to studies by Oxford Economics, over the past seven years, Brand USA's marketing initiatives have helped welcome 7.5 million incremental visitors to the USA, benefiting the U.S. economy with nearly \$55 billion in total economic impact, and supporting more than 50,000 incremental jobs each year.

Learn More

For industry or partner information about Brand USA, please visit TheBrandUSA.com. For information about exceptional and unexpected travel experiences in the United States, please visit Brand USA's consumer website at VisitTheUSA.com.

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A Message from Christopher L. Thompson



As the destination storytellers for the United States of America, Brand USA helps drive our nation's economy, create jobs, and bring the people of the world closer together. This guide is designed to assist you in generating business from the Benelux outbound-travel sectors. And, while it includes data from our fiscal year 2019, it's important to acknowledge the unprecedented impact of COVID-19 in 2020. The global pandemic

has resulted in tremendous loss for many families and has had a devastating impact on the travel industry. All of this makes Brand USA's work even more critical. We are uniquely positioned to help guide the industry out of this crisis.

Our forward-thinking marketing approaches allow us to capture the attention of global audiences in new, more compelling ways which ensure the United States stays top-of-mind as an aspirational travel destination. In September 2019, we debuted Brand USA Travel Week Europe. This event provided partners a cost-effective way to directly engage travel trade professionals from 20 European countries, including well-known and emerging markets. During the event, we detailed our *One Europe* strategy which considers the impact of Europe as a whole, with 14.5 million collective visitors to the United States in 2018. This *One Europe* strategy allows us to better leverage and amplify initiatives and partnerships, including those with tour operators, airlines and media who are all buying, reporting and distributing across borders.

In FY2019, more than 1 million visitors from the Benelux market traveled to the United States, spending more than \$2.8 million while in the USA. The Netherlands and Belgium are in the top 50 in terms of inbound visitation with the Netherlands ranking as the 14th largest overseas market with 727,229 visitors and Belgium as the 31st with 292,390 visitors. We believe promoting marketing strategies that look at *One Europe* will increase opportunities for engagement with trade and consumers in the Benelux region.



Brand USA uses many voices to showcase the diverse people and places across the United States in a way that inspires and encourages wanderlust. In FY2019, Brand USA launched the *United Stories* campaign giving voices to real travel experiences from a variety of perspectives including locals, international visitors, category experts and the creative class. We continued to stream content through the GoUSA TV streaming and YouTube channels, which offer a variety of short, medium, and long-form content about a diversity of travel experiences.

As you consider resources, please know Brand USA has a dedicated travel-trade website which provides a more effective and efficient platform for industry professionals to navigate information about U.S. travel. In addition, please don't hesitate to reach out to our team about U.S. destinations, the opportunities we offer to enhance your marketing efforts, and the most effective ways to inspire travelers to book trips to the USA.

We look forward to working with you in the months ahead to generate business to the United States from the Benelux region.

Together, we are marketing the USA!

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Market Facts



Geography

Area



The Netherlands

41,543 km²

Slightly less than twice the size of New Jersey

Belgium

30,689 km²

About the size of Maryland

Luxembourg

2,586 km²

Slightly smaller than Rhode Island;
about half the size of Delaware

Photos: Brussels, Belgium (left); Alkmaar, Netherlands (right)

Source: CIA World Factbook 2020

Climate

The Netherlands

Temperate and marine; cool summers and mild winters.

Benelux

Modified continental with mild winters, cool summers.

Demographics

Population

The Netherlands

17,280,397
(est. July 2020)

Belgium

11,720,716
(est. July 2020)

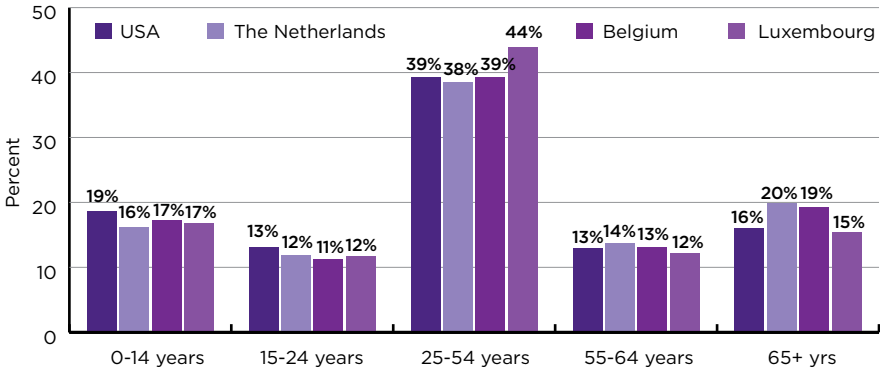
Luxembourg

628,381
(est. July 2020)

	The Netherlands	Belgium	Luxembourg	USA
Population Size	17,280,397	11,720,716	628,381	332,639,102
Median Age	42.8 years	41.6 years	39.5 years	38.5 years
Population Growth Rate (2020 est.)	0.37%	0.63%	1.8%	0.72%



Population by Age



Largest Metropolitan Areas

The Netherlands

Amsterdam (capital): 862,965

Rotterdam: 540,938

The Hague: 534,158

Utrecht: 349,234

An area known as the Randstad, anchored by the cities of Amsterdam, Rotterdam, the Hague, and Utrecht, is the most densely populated region; the north tends to be less dense, though sizeable communities can be found throughout the entire country.

Belgium

Belgium is a two-language country with French-speaking region, Wallonia, representing 3.6 million inhabitants and the Flemish-speaking region, Flanders, representing 6.4 million inhabitants.

The capital, Brussels—also capital of the European Union—has the particularity to be circled by Flemish speakers but has a vast majority of French-speaking inhabitants.

Brussels (capital): 1.18 million

Antwerpen: 523,248

Gent: 260,341

Charleroi: 201,816

Liège: 197,355

Luxembourg

Luxembourg (capital): 119,215

Economy

The Netherlands

- **GDP:** \$924.4 billion (2017 est.)
- **GDP Real Growth Rate:** 2.9% (2017 est.)
- **GDP—Per Capita:** \$53,900 (2017 est.)
- **Unemployment Rate:** 4.9% (2017 est.)
- **Inflation Rate:** 1.3% (2017 est.)

Belgium

- **GDP:** \$529.2 billion (2017 est.)
- **GDP Real Growth Rate:** 1.7% (2017 est.)
- **GDP—Per Capita:** \$46,600 (2017 est.)
- **Unemployment Rate:** 7.1% (2017 est.)
- **Inflation Rate:** 2.2% (2017 est.)

Sources: INS Belgium 2018; CIA World Factbook 2020



Luxembourg

- **GDP:** \$62.1 billion (2017 est.)
- **GDP Real Growth Rate:** 2.3% (2017 est.)
- **GDP—Per Capita:** \$105,100 (2017 est.)
- **Unemployment Rate:** 5.8% (2017 est.)
- **Inflation Rate:** 2.1% (2017 est.)

Vacation Allocation

Vacation Allocation and Public Holidays

Salaried Dutch employees earn an average of 20–30 days of paid vacation per year and by law a vacation salary of 8 percent of their annual gross salary. Fortunate workers also receive a thirteenth month salary and/or a bonus. There are 10 public holidays, regardless on the region of the country.

In Belgium, employees receive a minimum of 20 days of paid vacation by law, but this number can vary. There are 11 public holidays with an additional one depending on the region of the country.

Salaried employees in Luxembourg earn a minimum of 26 days of paid vacation, as well as enjoying 11 public holidays per year.

Primary Travel Periods and Public School Holidays

In the Netherlands, Belgium and Luxembourg, the public school holidays shape the primary travel periods:

- **Spring Holidays:** One week in February
- **Easter Holidays:** Two weeks in April and May
- **Summer Holidays:** Six weeks of school vacation, July–August
- **Fall Holidays:** One week in October
- **Christmas Holidays:** Two weeks in December and January

National Holidays 2020

The Netherlands

- **New Year's Day:** January 1
- **Good Friday:** April 10
- **Easter Monday:** April 13
- **King's Day:** April 27
- **Liberation Day:** May 5
- **Ascension Day:** May 21
- **Pentecost Sunday:** May 31
- **Whit Monday:** June 1
- **Christmas Day:** December 25
- **St. Stephen's Day:** December 26

Belgium

- **New Year's Day:** January 1
- **Easter Monday:** April 13
- **Labour Day:** May 1
- **Ascension Day:** May 21
- **Whit Monday:** June 1
- **Flemish Community Day:** July 11 (only observed by Flemish community)
- **Independence Day:** July 21
- **Assumption:** August 15
- **French Community Day:** September 27 (only observed by French community)
- **All Saints' Day:** November 1
- **Armistice Day:** November 11



- **German Community Holiday:** November 15 (only observed by German community)
- **Christmas Day:** December 25
- **Boxing Day:** December 26

Luxembourg

- **New Year's Day:** January 1
- **Easter Monday:** April 13
- **Mayday:** May 1
- **Europe Day:** May 9
- **Ascension Day:** May 21
- **Whit Monday:** June 1
- **Grand Duke's Birthday:** June 23
- **Assumption:** August 15
- **All Saints' Day:** November 1
- **Christmas Day:** December 25
- **Boxing Day:** December 26

Travel Trends

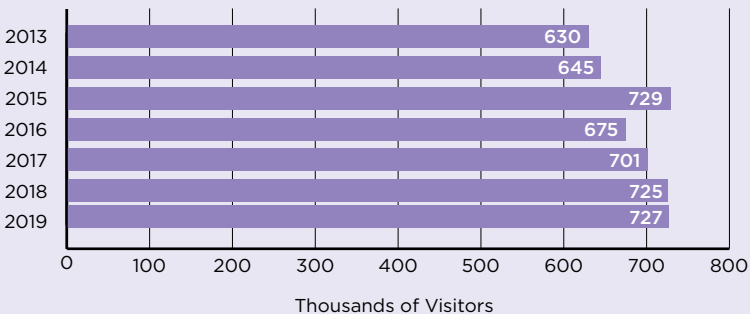


International Travel Trends: The Netherlands

Spending Trends: Exports (millions of U.S. dollars)

	2013	2014	2015	2016	2017	2018	2019
Total Travel & Tourism Exports	\$2,320	\$2,508	\$2,762	\$2,577	\$2,655	\$2,804	\$2,813
Travel Receipts	\$1,606	\$1,708	\$1,992	\$1,908	\$1,957	\$2,086	\$2,107
Passenger Fare Receipts	\$714	\$800	\$770	\$669	\$694	\$718	\$706
Change (%) in Total Exports	3	8	10	-7	3	6	0

Visitation Trends: Arrivals



Photos: Ghent, Belgium (left); Amsterdam, Netherlands (right)

Source: U.S. Department of Commerce, National Travel and Tourism Office



Traveler Characteristics: The Netherlands

Main Purpose of Trip

Main Purpose of Trip	2018 (%)	2019 (%)
Business	13.9	13.5
Convention/Conference/Trade Show	6.5	6.4
Education	1.8	1.3
Vacation/Holiday	57.6	59.6
Visit Friends/Relatives	18.6	18.2
Religion/Pilgrimages	0.2	0.2
Other	0.4	0.5

All Purposes of Trip

All Purposes of Trip	2018 (%)	2019 (%)
Business	17.2	16.5
Convention/Conference/Trade Show	8.9	7.8
Education	3.6	3.8
Vacation/Holiday	70.6	68.7
Visit Friends/Relatives	28.7	28.7
Religion/Pilgrimages	0.5	0.9
Health Treatment	1.2	0.3
Other	0.4	1.1

NET PURPOSES OF TRIP

Leisure & Visit Friends and Relatives	81.5	81.2
Business & Convention	23.5	23.1

Select Traveler Characteristics

Traveler Characteristics	2018	2019
Length of Stay in USA (Mean Nights)	13.8	12.8
Length of Stay in USA (Median Nights)	9	8
First International Trip to the USA	22.2%	22.1%

Source: U.S. Department of Commerce, National Travel and Tourism Office

U.S. Destinations Visited (States, Cities, and Regions)

U.S. Destinations/Regions	2018 (%)	2019 (%)
REGIONS		
South Atlantic	33.30	27.71
Middle Atlantic	39.03	39.50
Pacific	24.02	24.31
STATES/TERRITORIES		
Florida	20.06	16.57
California	21.48	20.53
New York	36.59	36.92
CITIES		
New York City	35.55	35.57

Transportation Used in the USA



36%

City subway/
tram/bus



36%

Auto, rented



34%

Auto, private



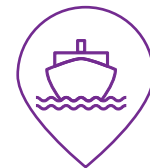
25%

Air travel
between
U.S. cities



24%

Taxicab/
limousine



11%

Ferry/river
taxi/short
scenic cruise



Activity Participation While in the USA



82%

Sightseeing



81%

Shopping



47%

National parks/
monuments



36%

Small towns/
countryside



35%

Historic locations



34%

Art gallery/
museum



25%

Guided tours



24%

Experience fine
dining



22%

Amusement
parks



15%

Nightclubbing/
dancing

Air Travel Information



Non-Stop Flights from The Netherlands to the USA

Airline	Flights From	Flights To	Plane	Frequency (week)
American Airlines	AMS, Amsterdam	DFW, Dallas/Fort Worth	Boeing 777-200	7 (daily)
American Airlines	AMS, Amsterdam	PHL, Philadelphia	Boeing 787-800 / Airbus A330-200	7 (daily)
KLM/Delta Airlines	AMS, Amsterdam	ATL, Atlanta	Boeing 777-200, Boeing 777-L, and Airbus 330-300	28
KLM/Delta Airlines	AMS, Amsterdam	AUS, Austin	Airbus 330-300	3
KLM/Delta Airlines	AMS, Amsterdam	ATL, Atlanta	Boeing 777-200, Boeing 777-L, and Airbus 330-300	3 (Mar. 30-May 5)
KLM/Delta Airlines	AMS, Amsterdam	ATL, Atlanta		7 (Mar. 30-Apr. 18)
KLM/Delta Airlines	AMS, Amsterdam	BOS, Boston	Boeing 767-W and Airbus 330-300	17
KLM/Delta Airlines	AMS, Amsterdam	ORD, Chicago	Boeing 747 and Boeing 747-E	2 (Mar. 30-May 5)
KLM/Delta Airlines	AMS, Amsterdam	DTW, Detroit	Boeing 350-900, Airbus 330-300, and Airbus 330-200	7 (Mar. 30-Apr. 18)
KLM/Delta Airlines	AMS, Amsterdam	IAH, Houston	Boeing 787-900	7 (daily)
KLM/Delta Airlines	AMS, Amsterdam	LAS, Las Vegas	Boeing 787-900	4

Photos: Rotterdam, Netherlands (left); Luxembourg City, Luxembourg (right)

Source: Brand USA Proprietary Research; Schiphol Airport, Aviation department



Airline	Flights From	Flights To	Plane	Frequency (week)
KLM/Delta Airlines	AMS, Amsterdam	LAX, Los Angeles	Boeing 747-400, Boeing 747-E, Boeing 777-200, and Boeing 767-300	3 (Mar. 30-May 5)
KLM/Delta Airlines	AMS, Amsterdam	MSP, Minneapolis/St. Paul	Airbus 330-300 and Airbus 330-200	25
KLM/Delta Airlines	AMS, Amsterdam	JFK, New York	Boeing 747-E, Boeing 777-200, Boeing 787-900, Airbus 330-300, and Boeing 767-W	7 (Mar. 30-May 5)
KLM/Delta Airlines	AMS, Amsterdam	MCO, Orlando	Boeing 767-W	7 (daily)
KLM/Delta Airlines	AMS, Amsterdam	PDX, Portland	Airbus 330-300	7 (daily)
KLM/Delta Airlines	AMS, Amsterdam	SLC, Salt Lake City	Boeing 787-900 and Boeing 767-W	10
KLM/Delta Airlines	AMS, Amsterdam	SFO, San Francisco	Boeing 747-400 and Boeing 787-900	12
KLM/Delta Airlines	AMS, Amsterdam	SEA, Seattle	Boeing 767-W and Airbus 330-300	14
KLM/Delta Airlines	AMS, Amsterdam	TPA, Tampa	Boeing 767-300	7 (daily)
KLM/Delta Airlines	AMS, Amsterdam	IAD, Washington, DC	Boeing 777-200	7 (daily)
Norwegian Airlines	AMS, Amsterdam	JFK, New York	Boeing 787-800	7 (daily)
United Airlines	AMS, Amsterdam	ORD, Chicago	Boeing 767-300	7 (daily)
United Airlines	AMS, Amsterdam	IAH, Houston	Boeing 777-200	7 (daily)
United Airlines	AMS, Amsterdam	EWK, Newark	Boeing 767-400	14
United Airlines	AMS, Amsterdam	SFO, San Francisco	Boeing 787-900	7 (daily)

Non-Stop Flights from Belgium to the USA

Airline	Flights From	Flights To	Frequency (week)
Delta Airlines	BRU, Brussels	ATL, Atlanta	7 (daily)
Delta Airlines	BRU, Brussels	JFK, New York	7 (daily)
SN Brussels Airlines	BRU, Brussels	JFK, New York	7 (daily)
United Airlines	BRU, Brussels	ORD, Chicago	7 (daily)
United Airlines	BRU, Brussels	EWB, Newark	7 (daily)
United Airlines	BRU, Brussels	IAD, Washington, DC	7 (daily)

Market Snapshot



The Netherlands

Overall Economic Situation

In November 2019, the Organization for Economic Cooperation and Development (OECD) issued the following statement about the Dutch current and projected economic outlook for 2020:

“After declining in 2019 due to the slowing of world trade, economy growth in 2020 is projected to be boosted by a significant fiscal stimulus package. The labour market will remain strong, with a low unemployment rate and solid wage growth.

The planned fiscal impulse will slow the decline in public debt as percent of GDP. There remains fiscal space to intervene should the international environment deteriorate further, particularly in the event of a disruptive Brexit outcome. Reducing the tax wedge between regular employees and self-employment would improve inclusiveness.

Weak external demand, especially from Germany, is weighing on export growth and has reduced the current account surplus slightly. By contrast, growth of business investment has picked up. Private consumption has been robust, largely reflecting low unemployment and strong wage growth. Consumer and business confidence, on the other hand, remain subdued. Headline inflation has fallen, as the effects of the past VAT increase have dropped out. A tight housing market has pushed up house prices, and housing construction has slowed.

Photos: Ghent, Belgium (left); Rotterdam, Netherlands (right)

Fiscal policy has become supportive. The budget for 2020 includes a reduction in income taxes and an increase in employment tax credits. Additional government spending will be directed to stimulate affordable housing and welfare. The fiscal package is about 1 percent of GDP and is estimated to increase growth in 2020 by 0.6 percent. The fiscal policy stance is appropriate given the economic slowdown, the sound fiscal position, the favourable debt trajectory, and the low cost of government financing. An active fiscal policy will support demand and narrow the current account surplus. Policy should consider additional action in the event of a disruptive Brexit outcome.”

With government financing costs near historical lows, an investment fund proposed by the government could help to strengthen the economy’s potential to cope with the forthcoming challenges of digitalisation, climate change, and population aging. Despite recent progress in reducing labour market duality, further reforms—in particular to the tax system and social security contributions—need to put self-employed and regular employees on the same footing.

GDP growth is projected to increase slightly, to 1.8 percent, in 2020 and then slow to 1.6 percent in 2021. Demand in 2020 will be mainly supported by private consumption and the strong fiscal stimulus. A sharper-than-expected deceleration in key export markets, including Germany, is a downside risk. The Netherlands remains vulnerable to continued uncertainty around Brexit.

Furthermore, high levels of house prices and household debt pose a risk for financial stability. Despite recent measures to reduce household debt, particularly the reduction of the mortgage interest payment tax deductibility, efforts should be continued and financial risks monitored. An upside risk is a stronger-than-anticipated rise in business confidence.

Dutch Travel Industry

According to a TravMagazine Netherlands survey, independent travel agents are becoming more and more important in the Dutch market.



As of October 2019, there are approximately 1,500 individual travel counsellors who are member of companies like Travel Counsellors, The Travel Club, Personal Touch Travel, TUI at home, MijnReiskennis, Face2Face Travel and Travel Company. The Travel Club generated a revenue of EUR126 million in 2018 and the Travel Counsellors were good for a revenue of EUR50 million in 2018. The total number of travel agencies in 2019 in the Netherlands was 1,163, a slight decrease from 2017 (1,176).

According to a TravMagazine Netherlands survey, independent travel agents are becoming more and more important in the Dutch market.

Dutch Travel Behavior

According to the annual consumer survey “Continuous Holiday Research 2019” conducted by NBTC-NIPO Research, the Dutch took short holidays more often last year.

The research of NBTC-NIPO shows that 84 percent of the Dutch went on holiday in 2019 with a total expenditure of EUR21 billion. This is 3 percent more than in 2018.

On average, Dutch people went on holiday 2.8 times. Other noteworthy things are the increase (+5 percent) of the very short holidays (1-2 nights) and the increasing popularity of foreign holidays by train (+27 percent). In fact, 56 percent of the holidays were abroad. The number of trips to faraway destinations increased by 8 percent compared to 2018. This also explains the 3 percent increase in the number of air travel and the 3 percent decrease in the number of car holidays.

For the first time, air travel caught up with cars as the most commonly used means of transport for holidays abroad. The number of holidays to European destinations, such as Germany, France and Spain, decreased notably. The top three most visited long-haul destinations for 2019 are as follows:

1. United States of America
2. Curaçao
3. Indonesia/Bali

Dutch Travel to North America

2018 visitation numbers from the Netherlands were reported at 725,283 visitors by the NTTO (U.S. Department of Commerce National Travel & Tourism Office). 2017 visitation numbers from the Netherlands were reported with a total of 700,872 visitors, representing an increase of 3.5 percent in 2018.

Considering the size of the Netherlands, with approximately 17 million inhabitants, it's notable that 1 out of 4 residents are travelling to the USA. Moreover, the Netherlands continues to be the sixteenth largest market for inbound tourism to the USA.

International airlines are increasing airlifts between Amsterdam and the USA with new non-stop connections, which results in more product increase with the tour operators and at the same time more consumer demand/interest to travel to the USA.

Top 10 Dutch Tour Operators with U.S. Business	Rev 2015 (€ Mio)	Rev 2016 (€ Mio)	Var. %	Rev 2017 (€ Mio)	Var. %	Rev 2018 (€ Mio)	Var. %
1. TUI Netherlands	1,148	1,189	3.6	1,263	6.2	1,376	8.9
2. De Jong Intra Vakanties	70,0	70,3	0.4	71	1	69	-2.7
3. Riksja Travel	40,7	45,6	120	51	11.8	55	6.9
4. Tenzing Travel	34,8	35,2	1.1	36,1	2.6	34,3	-5
5. Jan Doets	26,0	28,5	9.6	29,0	1.8	29	0
6. 333 Travel	27,0	27,0	0	25,0	0	26,3	5.2
7. ITG Companies	28,0	26,0	-7.1	26,4	1.5	26,9	1.9
8. Travel Trend	24,1	20,8	-13.7	23,5	13.0	22,6	-3.8
9. Tioga Tours	14,2	15,6	9.9	19,4	24.4	22,7	17
10. Sunair Vakanties	26,0	24,8	-4.6	27,5	10.9	26,5	-3.6

Sources:

OECD (Organization for Economic Cooperation and Development); ANVR; NBTC-NIPO Research; U.S. Department of Commerce National Travel & Tourism Office; TravMagazine TOP50 survey 2019

Belgium

Did you know that Belgian families are among the wealthiest in Europe?

According to ECB, Belgium's families represent EUR109,400 per year (Luxembourg is EUR89,000, France EUR50,000, and Germany EUR47,000). And with an annual EUR16.1 billion spend abroad, Belgian travellers are the number one in Europe for average holiday expenditure.

While Belgium looks like a small country, with 11 million inhabitants, Belgians are in fact the sixth biggest spenders per capita in the tourism industry. Belgium is the smallest country in the top 10 for this parameter and does better than countries such as Germany, the United Kingdom, Switzerland, and the USA.

Belgium enjoys an average of 4-5 weeks of holidays per year with full pay plus a holiday bonus. Belgian people take 12.7 million holidays a year, including 8 million for long holidays and 4.7 million for short holidays. 9.95 million (78 percent) go to Europe. The remaining 2.75 million (22 percent) travel outside Europe.

Every day, there are direct flights from Brussels airport to the USA, and because of the high-speed train connections, many will travel from Amsterdam or Paris. The fact that Brussels is the capital of the European Union and the seat of NATO headquarters makes the city different than any other European city. At any one time, there are over 6,000 diplomats in Brussels, plus 15,000 lobbyists and more than 1,000 foreign correspondents.

But as a two-language country, customer behavior will not be the same in Flanders (Flemish- and Dutch-speaking region) and Wallonia (French-speaking region). Travellers from Flanders often behave similarly to those from Netherlands, opting for escorts and/or RVs and booking through tour operators itineraries, while travellers from Wallonia will likely book just as a French traveller, sometimes relying on the travel agent expertise to eventually book by themselves.

In Wallonia and Brussels, the state has changed the law since January 2018, to make the travel agency business easier, with many travel agents working

as freelancers without a license, and customers booking through them as they would be helped by a friend. This has created much disparity in the market with a very structured offer in Flanders and a solid intermediation, while Wallonia shows more disintermediation. This is an opportunity for DMOs to stand out. With this drastic change in the way people book, more agents need to be trained about destinations than ever before, and in-market investments from destinations marketing organizations are lacking.

Belgium has sent 294,221 travelers to the USA in 2018, ranking Belgium 31st in the world and 11th in Europe, making the United States the number one destination for long-haul travelers from Belgium. It's estimated that more than 50 percent of Belgian travelers to the USA were repeat visitors in 2019.

With their strong, integrated agency network, Connections, Joker, and TUI Belgium reported huge numbers on the USA and continue seeing them increase each year. The rise of specialists such as USA Travel confirms that Belgian travelers want to go back to the United States and are ready to discover new areas.

Brand USA Resources



Online Channels

Digital Marketing/Social Media

The majority of the USA Campaigns are driven by digital marketing strategies to engage, inspire, and prompt international travelers to visit the United States. A variety of channels and methods are used, including:

- Proprietary website platforms
- Social media channels
- Global digital marketing and social campaigns
- Rich media
- Targeted advertising

Proprietary Consumer Website Platforms

Brand USA has two online consumer identities in the marketplace:

- VisitTheUSA (VisitTheUSA.com), which includes a global site in English plus in-language sites in most markets where Brand USA markets the United States to international travelers
- GoUSA, which is active in Asian markets, including China and Hong Kong (GoUSA.cn), Taiwan (GoUSA.tw), India (GoUSA.in), Japan (GoUSA.jp), and South Korea (GoUSA.or.kr)

Together, the VisitTheUSA and GoUSA website platforms are the consumer-facing online identities international travelers associate with travel to the United States.

Photos: Bruges, Belgium (left); Volendam, Netherlands (right)

Social Media Channels

In addition to the global and in-market VisitTheUSA and GoUSA proprietary websites, Brand USA leverages related social media accounts in consumer-facing content and communications. Each market where Brand USA has a fully developed marketing presence has a dedicated, in-language website and social channels, which Brand USA uses to reach consumers in its target markets.

The following handles are used for global, consumer-facing promotions in English:

- **Website:** VisitTheUSA.com
- **Twitter:** @VisitTheUSA
- **Facebook:** Facebook.com/VisitTheUSA
- **YouTube:** YouTube.com/VisitTheUSA
- **Instagram:** VisitTheUSA






























































The following campaign hashtags support global and thematic promotions and initiatives:

- **Global:** #VisitTheUSA
- **Flavors/Culinary:** #TasteUSA
- **Road Trips:** #RoadTripUSA
- **Great Outdoors:** #OutdoorsUSA
- **Market the Welcome:** #USAWelcome

In addition to leveraging these global channels, Brand USA currently has localized social media efforts in the following markets via the channels shown in the Digital Channels chart on the following page.



Digital Channels

Market	URL	Local Tagline	Channels		Hashtag
Australia	VisitTheUSA.com.au	Plan Your USA Trip Now	 @VisitTheUSA  @VisitTheUSA	 facebook.com/VisitTheUSAau  YouTube.com/VisitTheUSA	#VisitTheUSA
Brazil	VisiteosUSA.com.br	Planeje Sua Viagem Aos USA Agora Mesmo	 @VisiteOsUSA  @VisitTheUSA	 facebook.com/VisiteOsUSA  YouTube.com/VisiteOsUSA	#VisiteOsUSA
Canada: English	VisitTheUSA.ca	Plan Your USA Trip Now	 @VisitTheUSAcA  @VisitTheUSA	 facebook.com/VisitTheUSAcA  YouTube.com/VisitTheUSA	#VisitTheUSA
Canada: French	frVisitTheUSA.ca	Planifiez Votre Voyage Aux USA Dès Maintenant	 @VisitTheUSAcA  @VisitTheUSA	 facebook.com/VisitTheUSAcA  YouTube.com/VisitTheUSAFr	#VisitTheUSA
Chile	VisitTheUSA.cl	Planifica tu viaje a USA ahora	 @VisitTheUSAes  @VisitTheUSA	 facebook.com/VisitTheUSACl  YouTube.com/VisitTheUSAes	#VisitTheUSA
China	GoUSA.cn	即刻 定制 您的 USA 旅行 计划	<p>Sina Weibo (Chinese microblogging site/hybrid of Twitter and Facebook): http://weibo.com/GoUSAcn Tencent Weibo (Chinese microblogging site): http://t.qq.com/DiscoverGoUSA Youku (YouTube equivalent): http://i.youku.com/gousacn Weishi (Vine equivalent): http://www.weishi.com/u/23484775 Wechat (Chinese mobile social network for texting, images, music and articles sharing, mobile only): 美国国家旅游局 Lofter (Photo sharing platform): http://GoUSA.lofter.com</p>		#VisitTheUSA
Colombia	VisitTheUSA.co	Planifica tu viaje a USA ahora	 @VisitTheUSAes  @VisitTheUSA	 facebook.com/VisitTheUSACo  YouTube.com/VisitTheUSAes	#VisitTheUSA
France	VisitTheUSA.fr	Préparez Votre Voyage Aux USA Dès Maintenant	 @VisitTheUSAFr  @VisitTheUSA	 facebook.com/VisitTheUSAFr  YouTube.com/VisitTheUSAFr	#VisitTheUSA
Germany	VisitTheUSA.de	Plant Jetzt Eure Reise In Die USA	 @VisitTheUSA  @VisitTheUSA	 facebook.com/VisitTheUSAdE  YouTube.com/VisitTheUSAdE	#VisitTheUSA
Global	VisitTheUSA.com	Plan Your USA Trip Now	 @VisitTheUSA  @VisitTheUSA	 facebook.com/VisitTheUSA  YouTube.com/VisitTheUSA	#VisitTheUSA
India	GoUSA.in	Plan Your USA Trip Now	 @GoUSAin  @VisitTheUSA	 facebook.com/GoUSAin  YouTube.com/GoUSAin	#USATrip
Japan	GoUSA.jp	今すぐ USAへの 旅の 計画を	 @GoUSAjp  @VisitTheUSA	 facebook.com/GoUSAjp  YouTube.com/GoUSAjp	アメリカ旅行
Mexico	VisitTheUSA.mx	Planifica Tu Viaje A USA Ahora	 @VisitTheUSAes  @VisitTheUSA	 facebook.com/VisitTheUSAmx  YouTube.com/VisitTheUSAes	#VisitTheUSA
Korea	GoUSA.or.kr	지금 USA 여행을 계획해보세요	 @GoUSAkr  @VisitTheUSA	 facebook.com/GoUSAkr  YouTube.com/GoUSAkr	#미국여행
Sweden	VisitTheUSA.se	Plan Your USA Trip Now	 @VisitTheUSA  @VisitTheUSA	 facebook.com/VisitTheUSAse  YouTube.com/VisitTheUSA	#VisitTheUSA
Taiwan	GoUSA.tw	N/A	N/A	 facebook.com/GoUSA.official	N/A
United Kingdom	VisitTheUSA.co.uk	Plan Your USA Trip Now	 @VisitTheUSAuk  @VisitTheUSA	 facebook.com/VisitTheUSAuk  YouTube.com/VisitTheUSA	#VisitTheUSA

GoUSA_{tv} Available on Roku, Apple TV, Amazon Fire, iOS, and Android. Also accessible via GoUSATV.com and YouTube.

Brand USA Traveler Research: The Netherlands

Top Five Motivations for Selecting Last Intercontinental Destination

Question: What motivates your desire to visit that destination? Select all that apply (N=1017).

Base: Netherlands intercontinental travelers.



53%

Cultural historic attractions



42%

Beaches/seaside attractions



40%

Ecotourism and nature



34%

Local lifestyle



30%

Urban attractions

Top Five Strongest Impressions of the USA

For each of the following countries, select which characteristics, if any, describe it as a holiday destination. Select all that apply (N=1017). Base: Netherlands intercontinental travelers.

49%

Adventurous

46%

Diverse

28%

Trendy

27%

Friendly

27%

Energetic

Expected Travel Party Size of Next Intercontinental Trip

Question: Who will travel with you on this holiday? Select all that apply. Base: Netherlands intercontinental travelers (N=1017). Note: Totals may not add up to 100% due to rounding.



26%

One



50%

Two



11%

Three



10%

Four



4%

Five or more

Source: Brand USA Market Intelligence Study 2019



Top Five Channels Used in Destination Selection for Last Intercontinental Trip

Question: What sources of information did/will you use to select the destination for this holiday?
Select all that apply. Base: Netherlands intercontinental travelers (N=1017).



63%

Websites
via computer



33%

Personal advice
from family/
friends



28%

Websites/
applications
via mobile phone



27%

Websites/
applications
via tablet



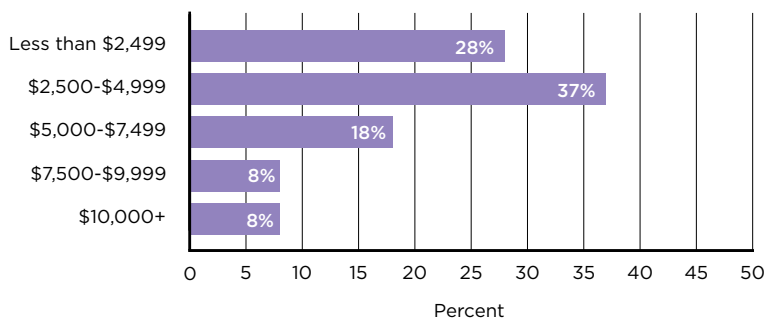
20%

Information
in print travel
guidebooks

Expected Household Travel Spend for Next Intercontinental Trip

Question: What is the total amount you expect your household to spend on each of the following elements of this holiday? Enter a whole number without the currency symbol. Airline tickets/Lodging/Additional trip-related expenses, such as dining, local transportation, souvenirs and local tours.

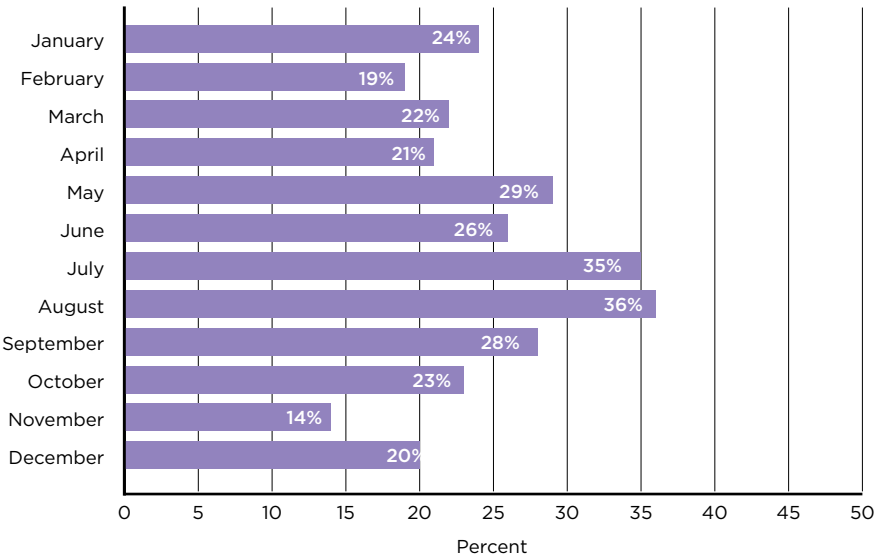
Base: Netherlands intercontinental travelers (N=1017). Note: Totals may not add up to 100% due to rounding (Conversion EUR to USD= 1.162).



Mean: \$4,888 **Median:** \$3,718

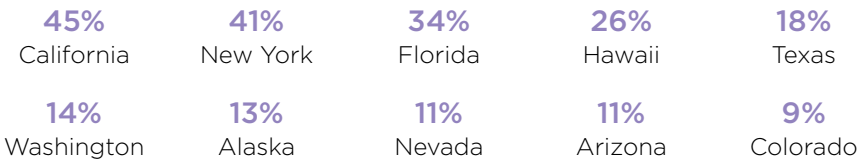
Months Traveled (March 2017–March 2019)

Question: During what month(s) did you take your holiday(s)? Base: Netherlands intercontinental travelers (N=1017).



Destination Interest—Top 10 States

Question: You indicated in a previous question that you have interest in visiting the USA sometime in the future. Which U.S. state(s) are you interested in visiting? Base: Netherlands intercontinental travelers with interest in visiting the United States (N=898).

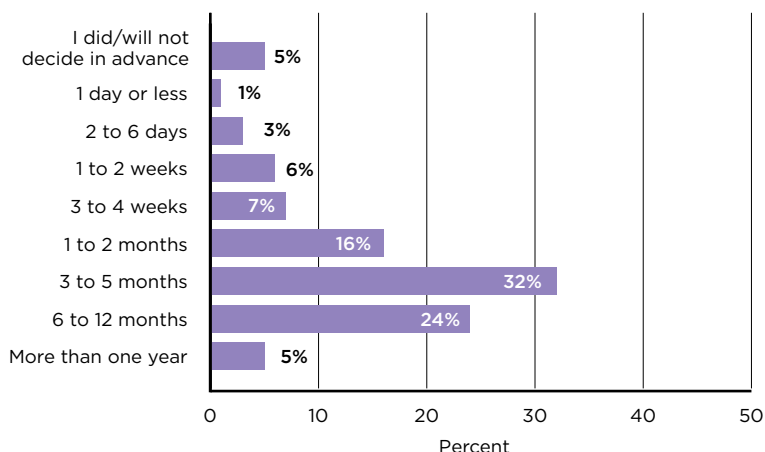




Destination Decision for Next International Trip

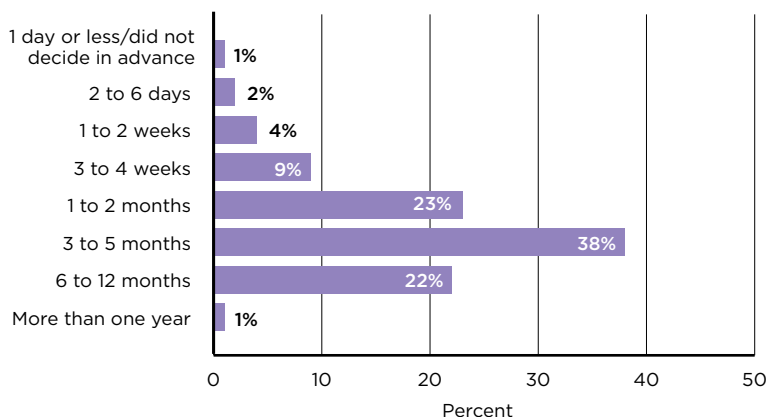
Question: How far in advance of your departure date did/will you decide on the destination?

Base: Netherlands intercontinental travelers (N=1017). Note: Totals may not add up to 100% due to rounding.



Air Booking for Next International Trip

Question: How far in advance of your departure date did/will you book the travel products for this holiday? Select one option from the drop-down box. Base: Netherlands intercontinental travelers (N=1017). Note: Totals may not add up to 100% due to rounding.



Source: Brand USA Market Intelligence Study 2019

Net Promoter

Question: United States of America: If a friend or relative were discussing a future holiday destination with you, which statement would best describe your attitude toward the following countries? Netherlands intercontinental travelers (N=1017). Note: Totals may not add up to 100% due to rounding.



32%

I would bring it up to recommend as a destination



28%

I would tell people positive things about it if it were brought up



28%

I would tell people neither positive nor negative things if it were brought up



8%

I would tell people negative things if it were brought up

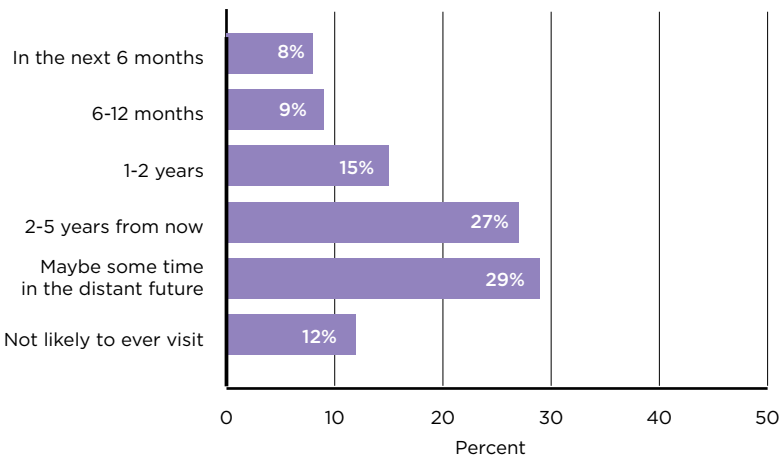


5%

I would bring it up to discourage people from traveling there

Likelihood of Travel to the USA

Question: When, if ever, are you likely to visit the following countries? Base: Netherlands intercontinental travelers (N=1017).



Source: Brand USA Market Intelligence Study 2019



Brand USA Traveler Research: Belgium

In the summer of 2013, Brand USA launched its Global Market Intelligence program. As part of this program, Brand USA commissioned PhoCus Wright, Inc. to conduct proprietary consumer research in various international markets. Respondents were recruited from an online panel. For markets beyond North America, the results reflect responses from adults who travel outside of their continent for leisure. The Global Market Intelligence program is designed to gain insight into travelers' perceptions of the USA and its competitors, as well as general travel behaviors and preferences.

Top Five Motivations for Selecting Last Intercontinental Destination

Question: What motivates your desire to visit that destination? Select all that apply (N=1007).

Base: Belgium intercontinental travelers.



52%

Cultural historic attractions



44%

Local lifestyle



43%

Beaches/seaside attractions



38%

Ecotourism and nature



33%

Urban attractions

Top Five Strongest Impressions of the USA

For each of the following countries, select which characteristics, if any, describe it as a holiday destination. Select all that apply (N=1007). Base: Belgium intercontinental travelers.

40%

Diverse

35%

Adventurous

31%

Trendy

26%

Energetic

25%

Arrogant

Top Five Channels Used in Destination Selection for Last Intercontinental Trip

Question: What sources of information did/will you use to select the destination for this holiday?
Select all that apply. Base: Belgium intercontinental travelers (N=1007).



55%

Websites
via computer



35%

Personal advice
from family/
friends



29%

Websites/
applications
via mobile phone



25%

Websites/
applications
via tablet

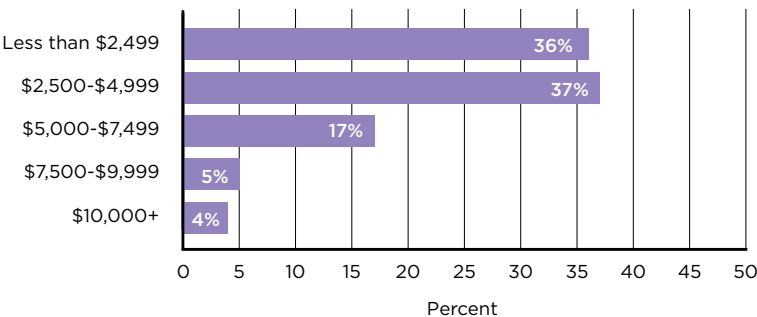


25%

Information
in print travel
guidebooks

Expected Household Travel Spend for Next Intercontinental Trip

Question: What is the total amount you expect your household to spend on each of the following elements of this holiday? Enter a whole number without the currency symbol. Airline tickets/Lodging/Additional trip-related expenses, such as dining, local transportation, souvenirs and local tours.
Base: Belgium intercontinental travelers (N=1007). Note: Totals may not add up to 100% due to rounding (Conversion EUR to USD= 1.129).

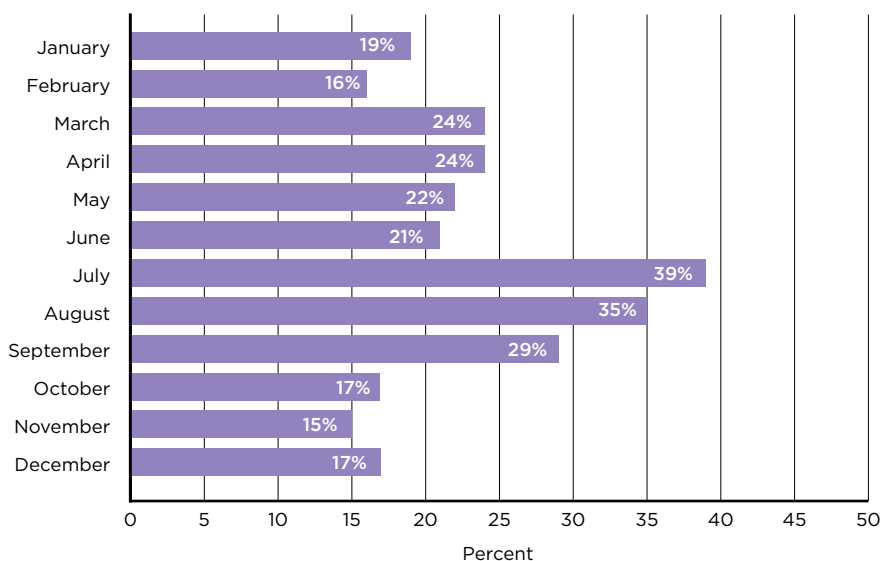


Mean: \$3,972 **Median:** \$3,254



Months Traveled (March 2017–March 2019)

Question: During what month(s) did you take your holiday(s)? Base: Belgium intercontinental travelers (N=1007).



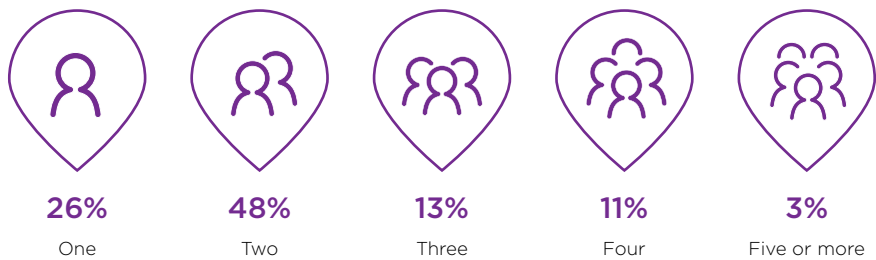
Destination Interest—Top 10 States

Question: You indicated in a previous question that you have interest in visiting the USA some time in the future. Which U.S. state(s) are you interested in visiting? Base: Belgium intercontinental travelers with interest in visiting the United States (N=869).

50%	48%	37%	25%	18%
New York	California	Florida	Hawaii	Texas
18%	15%	14%	12%	12%
Washington	Louisiana	Alaska	Arizona	Colorado

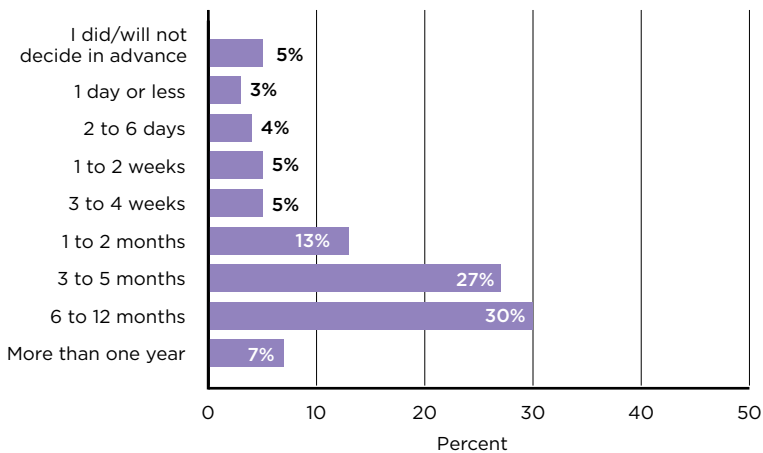
Expected Travel Party Size of Next Intercontinental Trip

Question: Who will travel with you on this holiday? Select all that apply. Base: Belgium intercontinental travelers 2018 (N=1037). Note: Totals may not add up to 100% due to rounding.



Destination Decision for Next International Trip

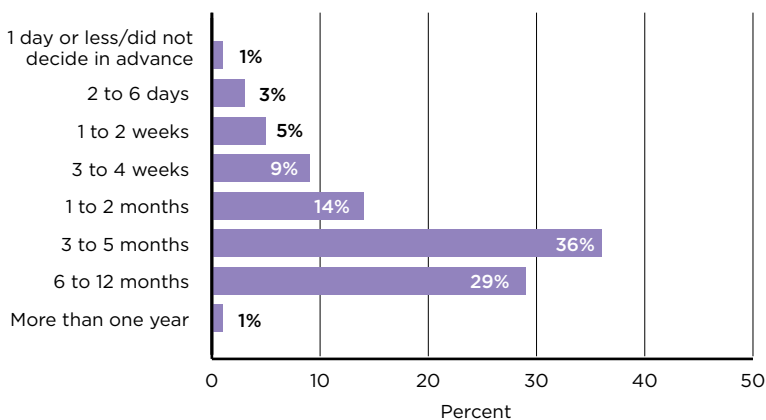
Question: How far in advance of your departure date did/will you decide on the destination? Base: Belgium intercontinental travelers (N=1007). Note: Totals may not add up to 100% due to rounding.





Air Booking for Next International Trip

Question: How far in advance of your departure date did/will you book the travel products for this holiday? Select one option from the drop-down box. Base: Belgium intercontinental travelers (N=1007). Note: Totals may not add up to 100% due to rounding.



Net Promoter

Question: United States of America: If a friend or relative were discussing a future holiday destination with you, which statement would best describe your attitude toward the following countries? Belgium intercontinental travelers (N=1007). Note: Totals may not add up to 100% due to rounding.



34%

I would bring it up to recommend as a destination



27%

I would tell people positive things about it if it were brought up



29%

I would tell people neither positive nor negative things if it were brought up



6%

I would tell people negative things if it were brought up

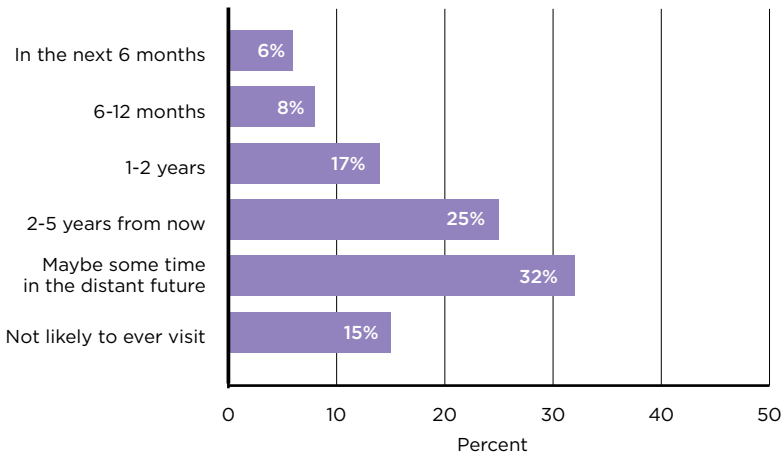


5%

I would bring it up to discourage people from traveling there

Likelihood of Travel to the USA

Question: When, if ever, are you likely to visit the following countries? Base: Belgium intercontinental travelers (N=1007).





Highlights of Success

Over the past seven years, Brand USA's marketing efforts have generated...

7.5 million
incremental visitors



nearly
\$25 billion
incremental spending

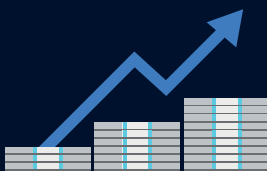


50,000+
incremental jobs
supported
each year

\$7.1 billion
federal, state &
local taxes



nearly
\$55 billion
total economic
impact



Brand USA Markets

Brand USA deploys its marketing efforts in a strategic combination of emerging and established markets that have the potential to drive the greatest returns in terms of visitation, spend, and market share.

Based on these market selection factors, Brand USA currently focuses the majority of its consumer marketing efforts in the following markets:

- Australia
- Brazil
- Canada
- Chile
- China
- Colombia
- France
- Germany
- India
- Japan
- Mexico
- South Korea
- Sweden
- United Kingdom

These 14 international markets generate more than 80 percent of inbound travel to the United States. In total, through the combined total of Brand USA's cooperative marketing platforms, contributed media, and trade outreach, the international marketing effort is present in more than 40 markets.

Brand USA Partnerships



Visit USA Committees

How Brand USA Works with Visit USA Committees

Brand USA works in collaboration with Visit USA committees around the world to promote the United States as a premier travel destination. These committees organize a wide range of promotional activity, including travel trade shows, workshops and training for travel agents and tour operators, roadshows with U.S. destinations, and more.

Visit USA committees are generally managed by voluntary members with an interest in promoting and selling travel to the United States. Brand USA collaborates with Visit USA committees and supports activities that align with Brand USA's objectives and marketing strategies. In addition, Brand USA makes use of the in-market expertise of Visit USA committees, both where Brand USA has representation and where it does not.

Visit USA Committee Netherlands

Hans Tattersall, Chairman

center@visitusa.nl

Visit USA Committee Belgium

Gérald Ponsard

President

gerald@visitusa.org

Elke De Winne

Vice President

elke@visitusa.org

Photos: Zeeland, Netherlands (left); Luxembourg City, Luxembourg (right)

Source: CIA World Factbook 2018, unless noted otherwise

About the U.S. Department of Commerce

Brand USA works in close concert with the U.S. Department of Commerce through the National Travel and Tourism Office (NTTO) and the U.S. Commercial Service.



The National Travel and Tourism Office (NTTO)

NTTO is the liaison between Brand USA and the federal government. The office works with Brand USA on behalf of the Secretary of Commerce, who appoints the Brand USA Board of Directors and approves Brand USA's annual objectives in consultation with the Secretary of State and the Secretary of Homeland Security. Additionally, NTTO facilitates the approval of matching funds for Brand USA and connects Brand USA to other federal agencies.

More broadly, NTTO creates a positive climate for growth in travel and tourism by reducing institutional barriers to tourism, administers joint marketing efforts, provides official travel and tourism statistics, and coordinates efforts across federal agencies through the Tourism Policy Council. The office works to enhance the international competitiveness of the U.S. travel and tourism industry and increase its exports, thereby creating U.S. employment and economic growth through:

- Management of the travel and tourism statistical system for assessing the economic contribution of the industry and providing the sole source for characteristic statistics on international travel to and from the United States;
- Design and administration of export expansion activities;
- Development and management of tourism policy, strategy and advocacy;
- Technical assistance for expanding this key export (international tourism) and assisting in domestic economic development.



Contact

NTTO

International Trade Administration
U.S. Department of Commerce
1401 Constitution Avenue, NW
Washington, DC 20230
202.482.0140
ntto@trade.gov

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The U.S. Commercial Service

Brand USA works closely with the U.S. Commercial Service (USCS) to pursue our mutual objective of promoting the United States as the premier international travel destination.

The USCS is the trade promotion arm of the U.S. Department of Commerce's International Trade

Administration. The USCS is a federal government agency with a domestic network of over 100 offices and a global network operating in over 75 countries. The mission of the USCS is to assist American companies in their export needs and to support foreign direct investment into the United States. As America's largest services export, travel and tourism is a key sector for the USCS.

The Commercial Service Global Travel and Tourism Team helps U.S. destinations and travel suppliers to attract international visitors and to grow international arrivals. This assistance can include: trade counseling, market research, vetting of potential partners, outreach to wholesale buyers, and support with international sales calls/trade shows/visits. To search for a domestic trade specialist near you, visit www.export.gov.



TheBrandUSA.com

7.30.20